New Housewares Show Products Carry Higher Price Tags

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
CORNING				
1	V360 Visions 6 pc Set	16,757	55.34	927,332
2	V300 Visions 6 pc S Pan Set	10,043	49.49	497,028
3	V5 Visions 5 qt Cov Saucpan	8,119	26.54	215,478
4	V20 Visions Cov Dbl Boiler	7,094	27.89	197,852
5	V10 Vns Skillet W/Cvr 10	7,759	19.79	153,551
6	A33-93 Trio Set Pastel Bou	4,164	26.99	112,386
7	A33-P Trio Set Cornflower	3,051	26.99	82,346
8	V2 ½ Visions 2½ qt Spa	2,946	22.49	66,256
9	V1 Visions 1 qt Cov Saucepan	4,200	15.74	66,108
10	F280 French White 3 pc Set	2,076	30.14	62,571
11	V-250-P 3 pc Visions Set	2,093	23.75	49,709
12	V31/2ST Vns 3½ qt Cov Steam	1,969	25.19	49,599
13	C-15 Sm Counter Saver Whit	3,021	15.11	45,647
14	C-15-95 Cntr Svr Ccl Mist	2,884	15.11	43,577
15	F3 FR Wh 10 in Pie Plate	3,316	12.86	42,644
TABLE TOP				
1	Corning 116-24 16 pc Set Burgundy	4,074	32.84	133,790
2	Corning 220-451 20 pc Peach Garland	3,090	42.20	130,398
3	Corning 116-23 16 pc Set Morning Bl	3,813	32.84	125,219
4	Corning 220-453 20 pc Normandy	2,504	42.20	105,669
5	Corning 116-38 16 pc Set Melody	2,854	32.84	93,725
6	Corning 116-25 16 pc Set Solitary	2,828	32.84	92,872
7	Corning 320-92 20 pc Spring Pond	1,608	57.05	91,736
8	Corning 116-29 16 pc Set Ribbon Bqt	2,744	32.84	90,113
9	Corning 320-81 20 pc Royal Garden	1,335	57.05	76,162
10	Corning 320-82 20 pc China Blossom	1,312	57.05	74,850
11	Corning 116-4 16 pc Set Butter Gold	2,228	32.84	73,168
12	Corning 320-333 Occa 20 pc Shadw Ir	1,274	57.05	72,682
13	Corning 320-334 Occa 20 pc Veranda	1,264	57.05	72,111
14	Corning 116-95 16 pc Set Colonial	2,181	32.84	71,624
15	Corning 320-332 Occa 20 pc Pacifica	920	57.05	52,486

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
GLASSWARE				
1	Anchor 3600/672A Entrtainr Set 40	5,961	35.09	209,171
2	Libbey 82486D 24 pc Bolero Blue	10,567	19.79	209,121
3	Libbey 82486T 24 pc Bolero Tawny	8,210	19.79	162,476
4	Libbey 82486 24 pc Bolero Crystal	3,658	19.79	72,392
5	Anchor 300/279C 18 pc Arl Punch	3,236	16.01	51,808
6	Libbey 82443 24 pc Impromptu Cry	2,442	20.69	50,525
7	Anchor 4523 Wexford Butter/Cov	17,368	2.42	42,031
8	Anchor 4525 Wexford Salt & Pepper	15,044	2.24	33,699
9	Anchor 2100/110 18 pc Tempo Cry	4,020	8.09	32,522
10	Libbey 81848 Symmetry 18 pc Cry	1,491	20.24	30,178
11	Anchor 4553E Wexford Sugar/Cover	12,587	2.24	28,195
12	Anchor PM486/TI Divided Dish w/Cv	3,912	7.10	27,782
13	Anchor 3700/128 24 pc Aurora Crys	2,360	11.69	27,586
14	Libbey 214T Monarch Bev 4 pk	5,125	4.94	25,318
15	Libbey 219T Monarch Cool 4 pk	4,434	5.57	24,697
BATH				
1	Selfix N443 Portable Shower Spray	7,729	10.79	83,396
2	Selfix 2353 Lg. Shower Caddy Wh	15,989	5.12	81,864
3	Magnolia M100 Molded Toilet Seat Wh	6,201	9.44	58,537
4	Selfix 2351 Shower Caddy Wh	15,017	3.14	47,153
5	Selfix C441-01 Self. Shampoo Spry W	18,958	2.42	45,878
6	Selfix 2110-01 Twin Hook Wh	29,750	1.52	45,220
7	Magnolia M3000A Padded Seat Wh	1,901	17.54	33,344
8	Selfix 2298 Tissue Holder	13,477	2.24	30,188
9	Ekco 38170 24 Towel Bar	9,344	3.14	29,340
10	Ekco 38110 18 in Towel Bar	10,778	2.69	28,993
11	Selfix 2274-01 Towel Bar 24 in Wht	12,281	2.33	28,615
12	Ekco 38160 24 Twin Towel Bar	5,405	4.94	26,701
13	Magnolia M3000A Padded Seat Bl	1,481	17.54	25,977
14	Selfix 2273-01 Towel Bar 18 in Wht	12,074	2.15	25,959
15	Ekco 38890 Toilet Tissue Holder	9,776	2.60	25,418

Source: HalMar Distributors, Holyoke, Mass., for Jan. 1 to Dec. 31, 1986, covering more than 500 stores, including 400 discount stores, from New England to the Carolinas. Average retail prices reflect typical price points for mass merchandisers.

(Continued from page 23)

While Clear Advantage sales should not effect traditional bakeware sales, it will no doubt drain sales from traditional clear Pyrex lines.

It will be interesting to see how the Pyrex ranking changes by this time next year. As it stands, Pyrex' Model 233 utility dish took the No. 1 spot with nearly $133,000 in retail volume. The Model 1215 Bakers Choice set and oblong bake dish ranked No. 1 and No. 2, respectively.

Ekco continues to steal the show in metal bakeware. Seven of the top movers in our cookware/bakeware listing carried the Ekco label.

Corning's Visions cookware was far and away the best dollar mover. The six-piece V360 set generated over $900,000 in retail volume during 1986. The six-piece saucepan set was a distant second with nearly $500,000 in volume.

The three-piece French white set continues to hold onto a top 15 spot as does the pie plate. After Corning introduces several new patterns at the April show, the French white could fade away from the top-selling limelight.

MANUFACTURER NEWS HOME PRODUCTS

LAKE GENEVA, Wis. — **The Cookware Manufacturers Association** has reported that industrywide sales of metal cookware, bakeware and miscellaneous kitchenware items declined 4.8% in 1986. Imports of cookware showed an increase of approximately 10%, while exports decreased about 30%.

The association reported that U.S. manufacturers sold $570 million of non-electric metal cookware, bakeware and miscellaneous kitchen items at factory billing in 1986, compared to manufacturer sales of $599 million in 1985.

The association reported that top-of--stove sales accounted for 74.7% of industry sales in 1986, compared to 76.4% in 1985. Metal bakeware rose to 21.4%, against 20.2% in 1985. Miscellaneous kitchenware sales hit 3.9% in 1986, up from 3.4%.

Aluminum cookware, both stamped and cast, represented a market share of 57% of all metal cookware in 1986, compared to 56.4% in 1985. Stainless steel cookware accounted for 39% in 1986, compared to 39.2% in 1985. Cast iron and other types such as porcelain and copper, totaled 4% in 1986, down from 4.3% in 1985.

* * *

DOWNERS GROVE, Ill. — **Sunbeam Appliance Company** has eliminated two low-end, 10½-in. models from its 1987 electric frypan line.

The models that will be continued in the line are higher priced frypans that provide better margins and features.

Models continuing in the line include two, extra-large, 13-in., SilverStone-coated frypans, one with removeable legs. Also to be continued is a deluxe 11½-in. large size SilverStone coated frypan.

* * *

TOWSON, Md. — **The Black & Decker Corporation** has proposed the sale on the European market of seven-year bonds in the principal amount of 100 million deutsche marks (approximately $56 million). The sale will be made through a syndicate to be formed by a bank.

Net proceeds from the bond sales will be used to pay short-term debt that was incurred primarily to retire certain high-interest, long-term debt in 1986.

The bonds will not be registered under the Securities Act of 1933 and will not be offered or sold in the United States or to United States nationals.

* * *

WEST DES MOINES, Iowa — **Commtron Corporation**, eleven studios that distribute prerecorded videocassettes and Parade Magazine announced a $14 million national consumer advertising progrm to promote new releases for rent and for sale.

The year-long program begins May 10 with a two-page centerfold and continues with a two-page double-truck ad on the 2nd Sunday and a single-page ad on the 4th Sunday of every month.

Each participating home video supplier will promote at least two titles per month. The color advertisements will describe the movies, list the day they become available, along with the suggested retail price if offered for sale.

The suppliers are CBS/FOX, HBO/Cannon, I.V.E. Karl Lorimar, MCA Video, Media Home Entertainment, MGM/UA, New World Video, Vestron and Walt Disney Home Video, as well as Warner Home Video.

Each "Now Playing" ad will list the names and addresses of local retailers where the tapes can be rented or bought.

Commtron recently reported a net earnings increase of 26% to $3.7 million for the six months ended February 28, 1987, up from $2.9 million for the previous-year period. Net sales increased 6% to $244.5 million, an increase from $230.6 million.

Because of 26% more average shares outstanding from a 2 million share initial public offering in July, 1986, earnings per share for the six months were 37¢, the same per share results as last year's period.

Net sales for the second fiscal quarter ended February 28, 1987 were $104.2 million compared to $115.9 million in the prior-year period. Net earnings were 1.6 million compared to $1.7 million. Earnings per share were 16¢ on 10.1 million average shares outstanding, down from 22¢ on 8 million shares for the previous year's quarter.

* * *

CHICAGO — **Joanna Western Holdings Inc.**, manufacturer of window fashions, has signed a definitive agreement to sell its Consumer Products Business to CHF Industries Inc. The sale is expected to be finalized by March 31, 1987.

CHF Industires, a subsidiary of CC Industries Inc., Chicago, owns Aberdeen Manufacturing and Cameo Curtain.

Joanna Western Holdings is the successor to Joanna Western Mills Company, Chicago, a textile marketer. The company's Industrial Products Division and the Phillips-Joanna Division are unaffected.

The only part of our line you can't discount is our name.

Pelikan

For Information: 1-800-251-3365 (in Tennessee call Collect 615-794-9000), Pelikan Inc., 200 Beasley Drive, Franklin, Tennessee 37064

Don't play games with your lungs.

Your lungs are an incredible piece of equipment. But they're also incredibly delicate. Every time you smoke, you damage your lungs. Puff after puff, day after day, your lungs get weaker and weaker until finally, they're useless. Like a flat football. Don't let that happen to your precious lungs.

—Eric Dickerson

TAKE CARE OF YOUR LUNGS. THEY'RE ONLY HUMAN.

AMERICAN LUNG ASSOCIATION
The Christmas Seal People

Space contributed by the publisher as a public service.

Hard Lines

Hardware Vendors Update Packaging to Appeal to Women

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
BATTERIES				
1	Ever E91BP-4 AA Alk Batt	319,023	3.07	979,401
2	Ever E93BP-2 C Alk Batt	372,903	2.42	902,425
3	Ever E95BP-2 D Alk Batt	299,988	2.42	725,971
4	Dura MN1500B4 AA Size 4-Pack	230,752	3.07	709,332
5	Ever 522BP Alk 9-Volt	257,262	2.42	622,574
6	Dura MN1400B2C Size 2-Pack	249,220	2.42	603,112
7	Dura MN1300B2 D Size 2-Pack	215,101	2.42	520,554
8	Ever E91BP2 AA ALk	258,028	1.74	448,969
9	Dura MN1604B 9-Volt 1-Pack	180,273	2.42	436,261
10	Dura MN1500B2 AA Size 2-Pack	193,993	1.74	337,548
11	Kodk KAA-4 AA 4-Pack Batt	52,272	2.91	152,112
12	Ever E92BP-4 AAA Alk	45,406	3.07	139,396
13	Ever 950-4 D Gen Batt	96,094	1.38	132,610
14	Kodk KC-2 C-2 Pack Batt	52,218	2.29	119,579
15	Ever 1250BP-2 DHD Batt	97,752	1.20	117,302
HAND TOOLS				
1	Stan 33-425 25-ft Tape Rule	2,246	14.00	31,444
2	Arrw T-50 Staple Gun Tack	1,199	16.97	20,347
3	Stan 33-212 12-ft Powr Rule	2,321	7.57	17,570
4	Stan 34-500 L Tape 100-ft	1,386	12.38	17,159
5	Stan 10-099 Retract Knife	4,941	3.47	17,145
6	Bost 203 Glue Gun	1,469	11.31	16,614
7	Stan 64-856 Screw Set 6-pc	2,099	7.81	16,414
8	Arrw T-55 Staple Gun Tack	1,179	13.70	16,152
9	Test G0030J 7-pc Scrdrv St	4,012	3.67	14,724
10	Stan 47-871 Chalk & Reel	3,013	4.56	13,739
11	Stan 30-525 25-ft Tape Rule	1,396	9.60	13,402
12	Stan 33-116 16-ft Powr Rule	1,057	12.47	13,202
13	Stan 33-312 12-ft Powr Rule	1,223	10.07	12,316
14	Stan 46-222 5½ Comb Sq	1,891	6.47	12,235
15	Stan 11-921 Heavy Duty Bl	10,908	1.08	11,781
PLUMBING				
1	Mold 1600 Toilet Tank Kit	3,693	6.50	24,005
2	Mold 1422 Super Plunger	7,225	3.26	23,554
3	Mold 1501 Basket Strainer	13,176	1.55	20,423
4	Mold 14206 Plunger 49021E	13,467	1.45	19,527
5	Mold 1660 Servo-Flush Kit	2,954	6.16	18,256
6	Mold 1603 Ballcock Brass	1,548	10.95	16,951
7	Mold 1619 Flapper Ball	12,015	1.40	16,821
8	Kess ½-In X 10-ft Copper Tube	2,530	5.93	15,003
9	Mold 18016 6-ft Fem X Fem	4,223	3.58	14,696
10	Mold 1601 Ballcock Plasti	3,303	4.48	14,797
11	Mold 1609 Tank Lever	7,080	1.74	12,319
12	Mold 2515 Louver Vent Kit	2,336	5.05	11,797
13	Mold 3525 Shower Massage	684	17.21	11,772
14	Mold 1406 Plumb Repair Kt	5,999	1.90	11,398
15	Mold 12013 Lucite Handle	3,300	3.39	11,187
PAINT SUNDRIES				
1	Klst PLA9 Paint Thin Gal	27,286	2.73	74,382
2	Manc 8615 2-In Duct Tape	14,476	4.28	61,957
3	Klst PT1K Pnt Thinner Qt	20,587	1.39	28,616
4	Manc MK403 1½-In Mask Tap	15,665	1.35	21,148
5	Manc MK404 2-In' Masking Tape	11,278	1.80	20,300
6	Webe 110 Plast Drop Cloth	22,252	0.90	20,027
7	Intl St Wool 8 Pad 0000	16,862	1.13	19,054
8	Manc MK401 ¾-In Mask Tape	29,300	0.64	18,752
9	Manc PK4 Mask Tape 2 X 60	9,804	1.80	17,647
10	Manc MK402 1-In Masking Tape	18,372	0.90	16,535
11	Manc 8300 Duct Tape 2-In X 30	5,681	2.89	16,418
12	Hyde 13050 Razr Scr & Blade	13,114	1.22	15,999
13	Manc FRD60 Fire Duct Tape	3,592	4.44	15,948
14	Webe 111 Utility Cover	8,656	1.70	14,715
15	Hyde 33100 Wal Stripper	2,820	5.19	14,636

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
LIGHT BULBS				
1	GE FAM36-60A/W Wht Bulb	198,622	3.23	641,549
2	GE FAM36-60A If Rg Bulb	183,518	2.30	422,091
3	GE FAM36-100A/W Wht Blb	125,958	3.23	406,844
4	GE FAM36-75A/W Wht Bulb	106,484	3.23	343,943
5	GE FAM36-75A If Rg Bulb	124,426	2.30	286,180
6	GE TWM 60-50/150 3-Way	133,606	1.93	257,864
7	GE FAM36-40A/W Wht Bulb	65,941	3.23	212,989
8	GE FAM36-100A Reg Bulb	84,488	2.30	194,322
9	GE 40A 40 Watt Bulb If	79,946	2.30	183,876
10	GE TWM 60-30/100 3 Way	70,155	1.93	135,399
11	GE 4C7 4 Watt Nite Lite	116,674	0.97	113,174
12	GE F20T12/SW Flour Bulb	21,181	4.33	91,714
13	GE FBS 25/WX Brit Stick	5,724	15.70	89,867
14	GE FC12T9/SW Circln Blb	12,775	6.58	84,060
15	GE 40A15 40W Applia Blb	73,728	1.06	78,152
POWER TOOLS				
1	B&D 7308 7¼-In Saw	2,402	41.29	99,179
2	B&D 9020 Cordless Drill	2,191	40.64	89,042
3	B&D 9330 Dustbuster	2,932	30.24	88,664
4	B&D 7391 7¼-In Circ Saw	944	55.46	52,354
5	B&D 7448 Sander	1,664	27.29	45,411
6	B&D 7190 ⅜-In Drill Vs	982	43.71	42,923
7	B&D 7043 M47 ¼-In Drill	1,714	24.27	41,599
8	B&D 7543 M47 Jig Saw	1,611	23.27	39,099
9	B&D 9021 Drill/Driver Kt	967	37.79	36,543
10	B&D 9334 Dustbuster Plus	908	38.92	35,339
11	B&D 7147 ⅜ Rev Drill	1,108	31.49	34,891
12	B&D 7144 ⅜ Var Drill	955	36.39	34,752
13	B&D 9360 Spotliter	1,364	24.97	34,059
14	B&D 7447 Belt Sander	597	50.15	29,940
15	B&D 7224 ½-In Drill	468	62.85	29,414
SECURITY				
1	Harl T-700 US3 Entry Mdl	4,526	9.23	41,775
2	Mast 1500D Comb Padlock	7,710	3.40	26,214
3	VSI V651X3 Entrance Lock	2,312	8.33	19,259
4	Harl UR 700-M-DL US3 Enty	1,053	15.22	16,027
5	Harl T-700-M-DL US5 Entry	1,590	9.74	15,487
6	Mast 22D Padlock 1½-In	6,194	2.00	12,388
7	Mast 500D Padlock 1¾	4,263	2.55	10,870
8	Idel 17-8533 Pneum Close	2,268	4.77	10,818
9	Mast 1D Padlock 1¾-In	1,603	6.05	9,698
10	Harl DC-DB 840 US3 Doub	782	12.04	9,415
11	Harl DC-DB 820 US3 Sing	967	9.31	9,003
12	Idel 45-3024 Nite Latch	1,449	5.98	8,665
13	Idel 11-6022 Knob Lock	1,331	6.20	8,252
14	Harl UM700 US5 Entry Mdl	449	17.92	8,047
15	VSI V640X3 Privacy Lock	1,232	6.49	7,996
SPECIALTY PAINTS				
1	Rust 7792 Gloss White 13	26,363	3.61	95,170
2	Rust 7779 Gloss Blk 13-oz	20,151	3.61	72,745
3	Rust 7792 Hi Gloss Wh Qt	6,795	6.62	44,982
4	Rust 7789 Red Prim 13-oz	11,933	3.61	43,078
5	Rust 7779 Hi Gloss Blk Qt	6,157	6.62	40,759
6	Kryl 1501 Gloss White	12,582	3.02	37,998
7	Rust 7715 Sivrmetal 13-oz	9,395	3.61	33,916
8	Rust 2081 Lt Gray Prmr 13	8,581	3.60	30,892
9	Rust 7776 Flat Blk 13-oz	8,581	3.60	30,892
10	Rust 7770 Almond 13-oz	7,196	3.60	25,906
11	NYBC 1704 Gloss Black	18,059	1.40	25,283
12	Rust 7789 Rusty Metal Qt	3,735	6.62	24,726
13	Rust 7785 Regal Red 13-oz	6,624	3.61	23,913
14	NYBC 1702 Appliance White	16,908	1.40	23,671
15	Rust 7778 BBQ Blck 13-oz	5,676	4.08	23,045

Source: Schreiber Company, distributor, Lititz, Pa., for calendar 1986, covering 825 stores, including 725 discount stores, in the Northeast, Southeast, Mid-Atlantic and North Central regions. Average retail prices reflect typical price points for mass merchandisers.

By Arnold Reinhard
Vice President, Sales and Marketing, Schreiber Company

Tactics to attain the two basic goals of the discount hardware buyer—to lure the female shopper and beef up sales per square foot—will continue to be attacked through updated carding, intensified crate programs and the occasional new product.

Manufacturers who have decided to address the two problems simultaneously have downsized the packaging to let more product be stocked in the same space, while developing instructional guides for the growing population of female do-it-yourselfers.

Plumbing, fasteners, cabinet hardware, specialty paints and paint sundries are most noticeably being repositioned to appeal to the discount store's native female consumer. Just take a look at how basic the step-by-step instructions have become and how commonplace decorative colors and florals have become.

A colleague of mine actually saw pastel colored tool boxes at one major discount chain on a recent field trip. I do believe we have only just begun to see the influence of the female shopper in hardware.

Combination pieces are being targeted in hand tools, items like interlocking wrench sets and screwdrivers with replaceable tips in the handle—anything that does more than one job and can be sold in essentially the same space as a single-purpose tool.

In power tools, the cordless/rechargeable trend will continue to dominate as manufacturers improve product staying power.

New product will also be the driving force in security, with introductions like General Electric's new vapor light system priced around $39.95. GE had sold a similar product for the commercial/contractor market for around $65, and is now going after broader base consumer sales.

MARKETWATCH

ROCHELLE PARK, N.J. — **Toys "R" Us (TRU)** reported earnings for the fourth quarter ended Feb. 1 at $116.1 million, or 89¢ a share, a 32% increase from $88.1 million, or 68¢ a share, during the same period last year. Sales rose 28% to $1.18 billion from $924 million a year ago. TRU earnings for the year rose to a record $152.2 million, or $1.17 a share, a 27% increase over $119.8 million or 93¢ a share last year. Sales for the year rose 24% to $2.45 billion, from $1.98 billion a year ago. Per share figures reflect a 3-for-2 stock split effective last June 27. The toy store chain with 295 units worldwide plans to open 45 toy stores in the U.S. and 13 toy stores internationally this year and will enter new toy markets in Pittsburgh, Phoenix and West Germany, said Norman Ricken, president and chief operating officer.

* * *

FREMONT, Calif. — A new toy combining both Lazer Tag, the No. 1 selling line in 1986 for **Worlds of Wonder** based here, and G.I. Joe, the best-selling line last year for Pawtucket, R.I.-based **Hasbro**, will be introduced in the fall as the toy market heats up for Christmas. The G.I. Joe Lazer Battle Game Kit is an infrared action toy that allows players to assume active roles as G.I. Joe characters. The Hasbro/Worlds of Wonder licensing agreement contemplates line extensions for the product category in the U.S. and Canada.

TOWSON, Md. — **The Black & Decker Corp.** obtained last month a patent infringement settlement from International Consumer Brands the day after suing the company in U.S. District Court in Chicago. In a release, B & D said ICB, based in Westport, Conn., had been passing off repainted B & D tools as its own Houseworks brand. ICB has agreed to stop the practice, surrender any tools in inventory and stop using photos of the tools in advertising and sales literature, B & D said. The power tools involved are its M47 line. George Sherman, president of the B & D power tools group, said the lawsuit is "consistent with Black & Decker's policy of vigorously enforcing its property rights when appropriate."

HEALTH & BEAUTY AIDS | HARD LINES

Discounters Capture 15.4% of $25.3 Billion H&BA Market

By Charles Bowlus
Executive Vice President, Sales, Boston Distributors

Health & beauty aid sales grew 6% to $25.3 billion in 1986 with discount department stores capturing $3.9 billion or 15.4% of the total business. New product introductions, and the increased marketing and advertising expenditures associated with them, drove the growth this year as it has in the past.

Boston Distributor's percentage increase leader was the eye care category with a 31% jump over 1985. Eye care grew 16% nationally to $795 million in 1986, and now claims over 17 million users.

Boston's greatest dollar growth in 1986 was in the deodorant category. Solids, now at 48% of the total dollar volume, picked up the largest market share gains.

The soft lens segment of the eye care business is now 67% and growing (22% in 1986) with 90% of new contact users going to soft lenses. Bausch & Lomb continues to lead the Product Movement Audit with six sku's among the top 15, but this dominance has eroded from the nine spots held last year. B & L's Sensitive Eyes saline in the 12-oz. size took top honors with sales over twice those of second place Soflens. Allergan, the maker of Soflens, was our biggest gainer with five spots on the top 15.

In 1987, look for aerosols, led by Lens Plus, to drive the saline segment growth. Hydrogen peroxide disinfection systems will also command attention in 1987 with Ciba Vision's A-O Sept, Lensept and A-O Disc the top sku's. Bausch & Lomb should continue its dominance of the category this year—despite the stiffened competition—due to the expansion into the growth categories and the strengthened 1987 promotional programs.

Boston's greatest dollar growth in 1986 was in the deodorant category with solids picking up the largest market share gains. Nationally, solids are now 48% of the dollar volume with roll-ons capturing 27% and aerosols at 25%.

The solid business has moved the total market due to the faster consumption rate of this form. The launch of wide solids by most manufacturers in 1986 drove the wide segment to over 50% of the solid market.

By mid-1987, every major manufacturer will be into solids, probably in a wide variety of scents. Aerosols are still a formidable part of the business and have actually grown by 27% over the last year. Sales per sku in aerosols are higher due to the limited number of scents in this segment.

Right Guard 10-oz. was our No. 1 deodorant sku followed by Sure 6-oz. Mennen's Speed Stick took the No. 3 spot and Lady Speed Stick was the biggest gainer of the year, taking three positions (No. 8, 9 and 11). Ban, ranked No. 6 and No. 13, was our top roll-on brand.

Shampoos, a $1.4 billion H&BA category, experienced less upheaval in 1986. The category was led once again by the 15-oz. size of Head & Shoulders in the top two spots. The shampoo market has been fragmented into three distinct price segments, with Head & Shoulders, Pert, Prell and Perma Soft representing the high end; Faberge, White Rain and VO5 on the low end, and Ivory and Flex in the middle.

The low end segment has made significant strides in capturing unit sales by representing the best promotional opportunity. Low dollar sales with the same handling cost as higher priced goods, however, can erode bottom line profitability if high end product is not pushed commensurately.

Pantene is the line to watch in 1987 on the high end with

(Continued on page 39)

EYE CARE

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
1	Bausch & Lomb Sens Eyes Saline, 12-oz	187,076	3.59	671,603
2	Soflens Cleaning Tablets, 24's	40,457	6.97	281,985
3	Bausch & Lomb Saline Solution, 12-oz	70,651	3.59	253,637
4	Soflens Cleaning Tablets, 12's	36,916	4.97	183,473
5	Bausch & Lomb Sens Eyes Saline, 8-oz	52,216	2.98	155,604
6	Allergan Clean & Disinfect Solution, 8-oz	29,835	4.97	148,280
7	Bausch & Lomb Disinfect Solution, 12-oz	29,146	4.59	133,780
8	Opti-zyme Enzymatic Cleaner, 24's	18,717	6.42	120,163
9	Bausch & Lomb Daily Cleaner, 1.5-oz	31,184	3.59	111,951
10	Lensept Disinfecting Solution, 8-oz	21,921	4.59	100,617
11	Soflens Cleaning Tablets, 48's	8,044	11.98	96,367
12	A O Sept, 8-oz	18,446	4.88	90,016
13	Bausch & Lomb Sens Daily Cleaner, 1-oz	25,004	3.59	89,764
14	Allergan Saline Solution, 8-oz	26,469	3.39	89,730
15	Flex Care, 12-oz	18,356	4.88	89,577

SHAMPOO

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
1	Head & Shoulders Norm/Oily Lotion 15-oz	73,340	3.69	270,625
2	Head & Shoulders Norm/Dry Lotion 15-oz	61,937	3.69	228,548
3	Ivory Shampoo Normal 15-oz	103,291	1.89	195,220
4	Head & Shoulders Norm/Oily Lotion 11-oz	52,745	2.97	156,653
5	Faberge Organic Shampoo 15-oz	97,964	1.39	136,170
6	Head & Shoulders Norm/Dry Lotion 11-oz	44,215	2.97	131,319
7	Faberge Organic Shampoo Extra Body 15-oz	94,439	1.39	131,270
8	Pert Plus Shampoo Normal 15-oz	32,525	3.29	107,007
9	White Rain Shampoo Extra Body 18-oz	66,229	1.59	105,304
10	Ivory Shampoo Extra Body 15-oz	53,514	1.89	101,141
11	Prell Shampoo Norm/Oily Liquid 16-oz	28,677	3.49	100,083
12	Pert Plus Shampoo Oily 15-oz	29,208	3.29	96,094
13	Prell Shampoo Norm/Dry Liquid 16-oz	26,130	3.49	91,194
14	Perma Soft Shampoo Dry 16-oz	27,405	3.29	90,162
15	Flex Shampoo Extra Body 15-oz	45,197	1.99	89,942

CONDITIONERS

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
1	Perma Soft Conditioner Dry 16-oz	25,257	3.29	83,096
2	Ivory Conditioner Normal 15-oz	43,633	1.89	82,466
3	Perma Soft Conditioner Regular 16-oz	22,511	3.29	74,061
4	White Rain Conditoner Extra Body 18-oz	42,096	1.59	66,932
5	Finesse Conditioner Extra Body 15-oz	18,146	3.49	63,330
6	VO5 Tube Regular 1.5-oz	20,835	2.99	62,297
7	Finesse Conditioner Extra Body 11-oz	16,220	3.49	56,608
8	White Rain Conditioner Regular 18-oz	34,224	1.59	54,416
9	Finesse Conditoner Regular 15-oz	13,393	3.89	52,099
10	VO5 Hot Oil Treatment 2-Pack	15,743	2.99	47,072
11	Suave Moisture Cond Extra Body 16-oz	28,484	1.59	45,290
12	Jhirmack Conditioner Extra Dry 8-oz	13,923	3.19	44,414
13	Silkience Conditioner Extra Body 15-oz	12,947	3.29	42,596
14	Halsa Conditioner Marigold 15-oz	21,098	1.99	41,985
15	Agree Conditioner Regular 15-oz	14,003	2.99	41,869

ANALGESICS

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
1	Tylenol Caplets Extra Strength 50's	127,764	3.69	471,449
2	Tylenol Caplets Extra Strength 100's	65,477	6.97	456,375
3	Anacin Tablets 100's	72,787	4.39	319,535
4	Tylenol Tablets Extra Strength 100's	46,004	6.79	312,367
5	Excedrin Tablets 100's	52,267	5.87	306,807
6	Tylenol Tablets Extra Strength 60's	58,432	4.29	250,673
7	Bufferin Tablets 100's	63,695	3.87	246,500
8	Advil Tablets 100's	34,612	6.97	241,246
9	Advil Tablets 50's	55,930	4.29	239,940
10	Tylenol Caplets Extra Strength 175's	31,087	7.67	238,437
11	Bayer Aspirin Tablets 100's	71,652	3.19	228,570
12	Tylenol Tablets 100's	43,635	4.28	186,758
13	Anacin Tablets 200's	20,730	8.43	174,754
14	Tylenol Caplets Extra Strength 24's	63,900	2.59	165,501
15	Excedrin Tablets 60's	34,302	3.97	136,179

CONTRACEPTIVES

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
1	First Response Pregnancy Test	7,543	10.58	79,805
2	EPT Plus Pregnancy Test	7,374	10.69	78,828
3	Encare Contraceptive Suppository	11,221	4.89	54,871
4	Gynol II Refill Large	6,639	7.97	52,913
5	K Y Jelly Large 4-oz	19,048	2.49	47,430
6	Today Vaginal Contraceptive Sponge	13,535	3.39	45,884
7	Conceptrol Disposable Gel 6's	8,882	4.89	43,433
8	Trojan Ribbed 12's	7,806	5.49	42,855
9	Trojan Enz Lub 12's	10,207	4.19	42,767
10	Delfen Foam Kit 20 GM	5,088	7.89	40,144
11	EPT Pregnancy Test	3,442	10.69	36,795
12	Ramses Extra 12's	6,418	5.69	36,518
13	Trojan Regular 12's	11,018	2.99	32,944
14	Lifestyles Nuda 12's	5,790	3.79	21,830
15	Lifestyles Stimula 12's	5,447	3.79	20,644

DEODORANTS

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
1	Right Guard Deodorant 10-oz	86,020	3.19	274,404
2	Sure Deodorant Regular 6-oz	57,443	3.69	211,965
3	Mennen Speed Stick Regular 2.5-oz	96,669	1.99	192,371
4	Secret Solid Antiperspirant Regular 2-oz	69,521	2.49	173,107
5	Sure Deodorant Unscented 6-oz	43,167	3.69	159,286
6	Ban Roll-On Deodorant Regular 2.5-oz	45,578	3.19	145,394
7	Mennen Speed Stick Musk 2.5-oz	70,191	1.99	139,680
8	Lady Speed Stick Regular 1.5-oz	73,468	1.89	138,855
9	Lady Speed Stick Powder Fresh 1.5-oz	72,452	1.89	136,934
10	Secret Roll-On Regular 2.25-oz	41,940	2.99	125,401
11	Lady Speed Stick Musk 1.5-oz	61,067	1.89	115,417
12	Secret Solid Roll-On 3-oz	29,283	3.89	113,911
13	Ban Roll-On Deodorant Regular 1.5-oz	48,782	1.99	97,076
14	Dry Idea Roll-On Regular 2.5-oz	25,306	3.49	88,318
15	Sure Deodorant Regular 4-oz	34,924	2.29	79,976

MOUSSE AND GELS

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
1	Aqua Net Mousse 5-oz	72,115	1.19	85,817
2	Alberto Mousse Extra Control 5.5-oz	21,991	3.49	76,749
3	Clairol Mousse Extra Control 6-oz	43,373	1.59	68,963
4	Suave Mousse Extra Control 5-oz	32,821	1.99	65,314
5	Aqua Net Styling Gel Spray 8-oz	62,714	0.99	62,087
6	Dippity-Do Extra Hold 8-oz	21,381	2.88	61,577
7	Dep Styling Gel Super with Pump 8-oz	20,161	2.88	58,064
8	Perma Soft Mousse Extra Hold 5.5-oz	19,392	2.87	55,655
9	Breck Mousse Extra 5-oz	27,938	1.99	55,597
10	Clairol Mousse Normal 6-oz	32,921	1.59	52,344
11	Vidal Sassoon Mousse Full Body 8-oz	12,885	3.49	44,969
12	Suave Mousse Soft Control 5-oz	19,708	1.99	39,219
13	White Rain Mousse Extra Body 5-oz	24,015	1.59	38,184
14	Finesse Mousse Extra Control 5-oz	11,132	2.88	32,060
15	Vidal Sassoon Styling Gel 4-oz	9,008	3.49	31,438

BLADES AND RAZORS

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
1	Atra Cartridge 10's	79,035	4.99	394,385
2	Atra Cartridge 5's	112,370	2.69	302,275
3	Gillette Trac II Cartridge 9's	48,577	4.99	242,399
4	Gillette Trac II Cartridge 5's	65,867	2.79	183,769
5	Atra Plus 5's	58,758	2.89	169,811
6	Good News Razor 10's	50,449	2.93	147,816
7	Schick II Twin Cartridge 9's	30,804	4.69	144,471
8	Schick Plus Platinum Injector 7's	40,575	3.49	141,607
9	Personal Touch Refill Cartridge 4's	48,825	2.69	131,339
10	Gillette Super Stain Steel Dbl Edge 10's	30,646	3.99	122,278
11	Good News Razor 5's	67,530	1.69	114,126
12	Bic Shaver 5-Pack	122,746	0.79	96,969
13	Bic Shaver 10-Pack	57,997	1.39	80,616
14	Good News Razor 3's	65,641	1.19	78,113
15	Gillette Microtrac Razor 5's	64,549	0.99	63,904

TOOTHPASTE

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
1	Crest Tartar Control Toothpaste 6.4-oz	184,828	1.69	312,359
2	Aqua Fresh Toothpaste 6.4-oz	163,218	1.69	275,838
3	Crest Regular Toothpaste 6.4-oz	143,739	1.69	242,919
4	Crest Mint Toothpaste 6.4-oz	109,034	1.69	184,267
5	Crest Gel Toothpaste 6.4-oz	108,158	1.69	182,787
6	Crest Tartar Control Toothpaste 8.2-oz	72,717	2.49	181,065
7	Colgate Regular Toothpaste 7-oz	102,010	1.69	172,397
8	Crest Tartar Control Gel Toothpaste 6.4-oz	92,369	1.69	156,104
9	Crest Tartar Control Toothpaste 4.6-oz	98,861	1.39	137,417
10	Crest Regular Toothpaste 8.2-oz	50,016	2.49	124,540
11	Crest Tartar Control Pump 4.6-oz	69,210	1.69	116,965
12	Colgate Regular Toothpaste 9-oz	46,772	2.49	116,462
13	Gleem II Toothpaste 7-oz	52,435	1.99	104,346
14	Crest Tartar Control Pump 6.4-oz	41,287	2.49	102,805
15	Crest Tartar Control Gel 8.2-oz	40,994	2.49	102,075

MOUTHWASH

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
1	Listerine Antiseptic 32-oz	211,370	3.59	758,818
2	Scope Mouthwash 24-oz	134,769	2.97	400,264
3	Scope Mouthwash 40-oz	53,935	4.97	268,057
4	Scope Mouthwash 32-oz	64,503	3.99	257,367
5	Listerine Antiseptic 18-oz	57,719	2.93	169,117
6	Signal Mouthwash 32-oz	49,295	3.19	157,251
7	Listerine Antiseptic 24-oz	47,196	3.29	155,275
8	Scope Mouthwash 18-oz	49,998	2.93	146,494
9	Listerine Antiseptic 12-oz	59,544	2.39	142,310
10	Scope Mouthwash 12-oz	57,216	2.39	136,746
11	Listerine Antiseptic 6-oz	64,044	1.69	108,234
12	Cepacol Mouthwash 24-oz	26,221	3.69	96,755
13	Scope Mouthwash 6-oz	49,189	1.69	83,129
14	Act Dental Rinse 12-oz	26,042	2.97	77,345
15	Listermint Mouthwash 24-oz	17,670	3.29	58,134

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Popularity of Eye-Level Brake Lights Signals Extra Profit

Nationwide DSN Report

Eye-level, third brake lights enjoyed the single most dramatic unit sales increase on the annual product movement audit for automotive accessories during 1986, soaring to over 30,500 units from a mere 7,500 unit sales on the previous year's ranking.

Margins on the rear window light were estimated to be over 30% by distributor Allied Accessories & Auto Parts Co., representing a good profit opportunity.

The automotives aftermarket business remains dominated by motor oil and oil filter sales—commodity merchandise where margins have been eroded due to competitive promotions.

Turtle Wax, Armor All, Borden and Johnson exterior automobile treatments vied for sales during 1986 and resulted in some winners and some losers.

Sales of smaller containers of body treatment formulas were generally stronger than the higher fluid ounce bottles and tins. It appears car owners might be choosing to sample each product before committing themselves to a larger supply that could last through several applications.

The No. 3 listing, Armor All Protector 16-oz., showed a 50,000 unit plummet in sales between 1986 and 1985, and the 32-oz. size dropped nearly 10,000 units.

Smaller size containers, on the other hand, had a much better performance. The 8-oz. size, ranked No. 5, captured over 30,000 additional unit sales. Volume of Armor All Protector in the 4-oz. size rose by 1,000 units between the two years.

The trend toward smaller containers reversed itself on the Borden Raindance Paste line. The 14-oz. size, which ranked No. 8 on the 1986 listing, sunk 4,000 units under the previous year while the 16-oz. Raindance Liquid unit sales rose by about 2,000 units.

In most instances, halogen lights appear to be taking sales away from non-halogen sealed beams.

While the No. 2 ranked Model 6052 large, square sealed beam plummeted nearly by nearly 30,000 units from 1985 to 1986, the halogen model by the same vendor went up by about 4,000 units.

Sales of smaller containers of body treatment formulas were generally stronger than the higher fluid ounce bottles and tins.

Similarly, although the low, square sealed beam ranked higher—No. 11 on this year's chart—the halogen variety, No. 28, had higher sales between 1986 and the previous year.

The non-halogen model again dropped by about 30,000 units while the halogen type rose about 6,000 during that time frame.

The shift toward the halogen light, while resulting in an overall decrease in the number of units sold, is somewhat compensated by the higher margins. Non-halogens were estimated to generate margins in the teens or low 20's, while the halogen models netted closer to 30% margins.

The simple do-it-yourself (DIY) automotives market continued to be alive and well with oil filters, headlights, auto bulbs, mufflers and spark plugs holding about a third of the top spots. Unit sales of almost all of these auto accessory items experienced growth between 1985 and 1986.

Decoratives Rising

Decorative automobile accessory purchases continue to generate good margins and rising sales.

Plush and vinyl floor mat sales were up about 2,000 units in every color and style except the basic black. It would seem that if an automobile owner decided he wanted to protect the floor of his car, he would buy blue, gray or some other color that would add fashion as well as function to the interior.

Mats continue to help automotives department profits with margins nearing the 40% level.

The 1986 ranking had fewer running boards, window film kits and other decorative merchandise that had captured several of the previous year's top spots.

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
	AUTOMOTIVES			
1	Ford Fila Motorcraft Oil Filter	169,339	2.99	506,324
2	Napic 6052 Sealed Beam, Large Square	60,484	7.99	483,267
3	Armor 16-oz Armor All Protector	58,465	6.99	408,670
4	Turtl Super Hrd Shell Paste 14-oz	84,131	4.69	394,574
5	Armor 8-oz Armor All Protector	116,926	3.29	384,687
6	Napic H6054 Halogen Seal beam, Lg Sq	23,882	15.99	381,873
7	Magnm Rear Window Brake Light W/Modu	30,596	11.99	366,846
8	Bordn Raindance Paste (Appl Pk) 14-oz	52,122	6.99	364,333
9	Magnm 1157 Auto Bulbs 2 on a Card	403,683	0.89	359,278
10	Gmout 7450 Jet Spray 13-oz	170,721	1.99	339,735
11	Napic 4652 Sealed Beam, Low Sq	64,509	4.99	321,900
12	AC-Del R45TS-8B Spark Plugs	32,236	9.69	312,367
13	Magnm 2 Ton Mini Hydraulic Floor Jck	6,869	44.99	309,036
14	Magnm Quartz Halg Fog Light Kit Amb	9,468	29.99	283,945
15	Quaker State Deluxe 10W40	226,156	1.23	280,207
16	Quaker State Sup Blnd 10W30	240,568	1.15	278,097
17	Bordn Raindance Liquid (Apl Pk) 16-oz	37,606	6.99	262,866
18	FRS-14 InterFreon 14-oz	200,537	1.29	258,693
19	Swiss 3431 Snowhite Lit 'N' Easy Gal	24,499	9.99	244,745
20	Magnm 15-in Wire Wheel Cover Ea	12,807	18.99	243,205
21	Napic 6014 Sealed Beam, Large Round	80,553	2.99	240,853
22	Gmout 7518 Carb Clean 12-oz	140,664	1.69	237,722
23	AC-Del PF-47 Oil Filters	65,987	3.49	230,295
24	Cstrl GTX 20W50 Qt Motor Oil	156,650	1.44	226,986
25	Ford E43Z-12A297A DY425 Module	3,194	68.46	218,674
26	Magnm Quartz Hal Driv Light Kit Cler	7,177	29.99	215,238
27	Qwarco 1002 Dot-3 Brake Fluid	54,667	3.89	212,654
28	Napic H4656 Halogen Seal Bean, Lq Sq	23,203	8.99	208,595
29	Bluec Westl Bleche-Wite-Liquid 20-oz	103,583	1.99	206,130
30	Pnzol Multi-Vis 10W40	147,227	1.28	187,862
31	Champ RV15YC4BP8 (RBL15Y4) Plg	19,208	9.69	186,126
32	Madco Wind Film Kit Smk 20-in x 10-ft	19,856	8.99	178,505
33	Uncrb Pres Heavy Duty Brake Fld 12-oz	89,090	1.99	177,289
34	STP Oil Treatment 15-oz	104,096	1.69	175,922
35	Magnm 194 Auto Bulbs 2 on Card	133,823	1.29	172,632
36	Armor 4-oz Armor All Protector	101,505	1.69	171,543
37	Pnzol Multi-Vis 10W30	146,868	1.17	171,395
38	Wd-40 Aerosol 9-oz	84,454	1.99	168,063
39	Radsp Gunk Engine-Brite Aero 20-oz	92,701	1.79	165,935
40	Ford FL400A Motorcraft Oil Filter	41,309	3.99	164,823
41	Truct One Piece Auto Ramp, Pair	9,150	17.99	164,609
42	Turtl Zip Wax Liq Car Wash 18-oz	59,757	2.69	160,746
43	Magnm Air Compressor W/Lite 225 Psi	6,419	24.99	160,410
44	Ac-Del PF-25 Oil Filters	45,658	3.49	159,346
45	Rberk 16-in Wiper Blade Refill	72,317	2.19	158,374
46	Texco Havoline Motor Oil 10W40 Qt	133,570	1.18	157,479
47	Magnm 2 Ton Hydraulic Floor Jack	5,196	29.95	155,620
48	Warco 1001 Dot-3 Brake Fluid 12-oz	103,644	1.49	154,430
49	Truct 4000 Lb Jack Stand, Each	30,911	4.99	154,246
50	Sctre Chamois 2½ Sq Ft	25,017	5.99	149,852
51	Pylon 1028 18-in Wiper Refills	78,899	1.89	149,119
52	Thrsh T-3154 Muffler	8,278	17.99	148,921
53	Magnm Air Compressor W/Guage	7,295	19.99	145,827
54	Pylon 1026 16-in Wiper Refills	77,090	1.89	145,700
55	Shalr 100QR Risione Oil Alloy 32-oz	51,243	2.79	142,968
56	Rberk 18-in Wiper Blade Refill	65,259	2.19	142,917
57	Magnm Antenna Sprng W/Booster 45-in	15,846	8.99	142,456
58	Bars C-16 Leak 12-oz (80)	56,159	2.49	139,836
59	Champ RN12YCBP4 Plg	27,774	4.99	138,592
60	AC-Del PF-35 Oil Filters	39,693	3.49	138,529
61	Thrsh 490 Turbo Muffler	9,817	13.99	137,340
62	Rberk 16-in Wiper Blades	62,695	2.19	137,302
63	Armor 32-oz Armor All Protector	13,691	9.99	136,773
64	Magnm Hi-Intnsty Fog Light Kit Amber	10,496	12.99	136,343
65	JWax Kit Paste Car Wax 12-oz	33,987	3.99	135,608
66	Snap Fix-A-Flat 12-oz	84,731	1.59	134,722
67	Spdcl B101BP Top Post Hd Term 1/Cd	111,174	1.19	132,297
68	Magnm 1156 Auto Bulbs 2 on Card	101,956	1.29	131,523
69	Magnm 13-in Wire Wheel Cover Ea	6,850	18.99	130,082
70	Sctre Chamois 4½ Sq Ft	11,749	10.99	129,122
71	Turtl Super Hard Shell Liquid 10.75-oz	38,963	3.29	128,188
72	FPinc Turbo-Jet Brush Kit	7,517	16.99	127,714
73	FPinc Pants-Saver Front Mat-Black	7,481	16.99	127,102
74	LF-1 FDI Lee Oil Filter	41,604	2.99	124,396
75	Rberk 18-in Wiper Blades	56,578	2.19	123,906
76	Magnm 1157NA Auto Bulbs 2 on Card	77,701	1.59	123,545
77	Uncrb Pres Heavy Duty Brake Fld 32-oz	24,415	4.99	121,831
78	Ac-Del PF-51 Oil Filters	34,716	3.49	121,159
79	Uncrb Prestone Super Flush 22-oz	40,317	2.99	120,548
80	Texco Multi-Service Grease 14-oz	86,135	1.39	119,728
81	Magnm Qrtz Fog Lite Blk Fbrgls Cs Am	3,304	35.99	118,911
82	Magnm 14-in Wire Wheel Cover Ea	11,898	9.99	118,861
83	Sctre Holland Chamois 4½ Sq Ft	11,750	9.99	117,383
84	TMP Instant Spare Tire Inflator 12	71,779	1.59	114,129
85	Univr 20-in Wheel Wrench	22,817	4.99	113,857
86	Atune Booster Cable Sleeved 12-ft 10G	15,185	7.49	113,736
87	TMP Heavy Duty Instant Spare W/Hse	49,448	2.29	113,236
88	Dibnt Dl Hand Cleaner Blu Label 14-oz	87,738	1.29	113,182
89	Rubqn Escort Carpet Twin Front Gray	5,382	20.89	112,430
90	Stwrt CD-2 Oil Detergent Black Label	46,937	2.39	112,179
91	FPinc Pants-Saver Front Mat-Gray	6,601	16.99	112,151
92	Champ N12YCBP8 Plug	12,313	8.99	110,694
93	Rubqn Promo Carpet Mat 4-pc Set Blue	7,364	14.99	110,386
94	AC-Del R44T-8B Spark Plugs	11,384	9.69	110,311
95	TMP Sandable Primer Grey	55,070	1.99	109,589
96	FPinc Pants-Saver Front Mat-Blue	6,427	16.99	109,195
97	Swiss 3305 Snowite Lite-N-Ez Qt Kit	21,754	4.99	108,552
98	Octan 104 Boost 12-oz	20,120	5.39	108,447
99	Anco Wiper Refill Pair 18-in	25,253	4.29	108,335
100	Cstrl GTX 10W40 Qt Motor Oil	77,203	1.40	107,930
101	Thrsh 491 Turbo Muffler	7,659	13.99	107,149
102	Sun Tachometer Super Tach II	2,137	49.99	106,827
103	Magnm 1000 Mini Triple Gauge Kit	7,042	14.99	105,559
104	AC-Del R45TSX-8B Spark Plugs	10,861	9.69	105,243
105	Lubmt Midget Grease Gun Kit	13,137	7.99	104,964
106	Anco View Pk Wiper Blade 18-in	23,664	4.39	103,884
107	Lubmt Multi Service Grease 3/Tube 3-oz	40,091	2.59	103,835
108	Pnzol Z-7 30W	93,659	1.10	102,837
109	Intar AC Rechrge Kit W/Red Dye Freon	14,836	6.89	102,220
110	Fpinc Pants-Saver Front Mat-Burgundy	5,972	16.99	101,464

Source: Allied Accessories and Auto Parts, distributor, Madison Heights, Mich., for the year ended January 1987. The company services more than 2,500 retailers, primarily discounters.

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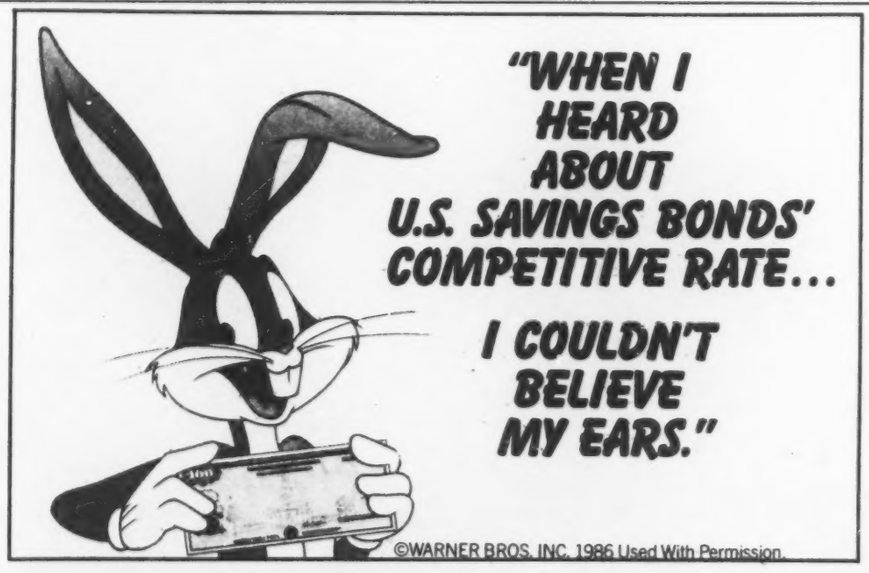
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Retailers Now Call Shots in Market With More Toys Available Sooner

By Jeffrey C. Kasch
President,
M.W. Kasch Company

It will be a challenge this year to maximize the potential in toy volume due to the current uncertainty over which products will emerge to drive the business in the fourth quarter, as well as a flood of choices available to distributors and retailers.

A major change occurring this year in the industry is that it is becoming much more buyer/merchant-driven, rather than manufacturer-driven, thanks to the varied choices of product available at earlier dates, allowing retailers much more flexibility.

Toy manufacturers have been heavily involved in shipping products to distributors and retailers since January. There has been more toy business in the first eight weeks of this year than ever before.

However, it seems that the hot product for Christmas 1987 will surface later than in the past. There is no consensus at the moment over which product and/or category will drive the business.

At the current time, the hot sellers for us are: G.I. Joe, low-end Transformers retailing for under $10, Silverhawks, Ghostbusters, Barbie Rockers, Pogo Bal, Sweet Secrets Jewelry and board games in general. On the other hand, the not-so-hot products at this moment are Lazer Tag, Pound Puppies, Mask and Captain Bravestar.

Unfortunately, what is selling right now has no bearing on what will be the true winners of 1987. Nevertheless, I believe the two hottest categories for 1987 will be the interactive television toys and the video game business. At this moment, Atari, Sega and Nintendo are doing very well for us and I believe, despite Atari's low movement in 1986, that it will be one of the top 10 movers in 1987.

As for Christmas 1987, I predict the hot products to be a combination of basic product such as Barbie, G.I. Joe, Transformers, board games, as well as the play food and preschool categories.

It seems that the "back to the basics" atmosphere that pervaded the toy industry in 1986 is continuing in 1987. More consumers are becoming price conscious and seeing better value for their money in basics. At the same time, retailers are seeing more margin return with basic product.

Plush Will Grow

Pricing is far more elastic on non-name branded plush than on highly recognizable toys. In 1987, there will be a 50% increase in volume in the traditional plush category. There will also be renewed interest in Disney plush toys.

Board games came to life in the third and fourth quarter of 1986, and this year we can look for a 30% to 40% increase in the category. There is also a steady rebuilding of interest in preschool, and I expect a 20% increase in that category this year.

Lazer Tag, the hottest product of Christmas 1986, was not our No. 1 mover for the year due to its being shipped late and in small quantities. Instead, talking Teddy Ruxpin took the lead for the year. In 1987, I do not think the talking plush category will generate as many total dollars as it did last year.

Pound Puppies also did extremely well for us in 1986. It was just a very clever concept introduced upon the heels of the Cabbage Patch success "to adopt a puppy." It was also cleverly packaged. However, the category is currently falling asleep on us and I think this item has run its course. Contrary to what many may believe, Cabbage Patch, on the other hand, is alive and well as indicated by its movement in 1986. In 1987, Cabbage Patch kids will grow by 10% to 20% depending on whether the talking Cabbage Patch introduced this year sells well.

It will continue to be a relatively cautious year, however, in terms of high price promotional merchandise. I do not believe the $100 talking dolls with artificial intelligence will be successful this year. No one has taken an upfront position with them yet.

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
	TOYS			
1	Worlds of Wonder Talking Teddy Ruxpin	27,000	59.99	1,619,730
2	Bontempi B/O 12-Key Organ	39,000	16.99	662,610
3	Pressman Wheel of Fortune	52,000	11.99	623,480
4	Tonka Pound Puppies Asst	34,000	17.99	611,660
5	Cuddlewit Mini Yuppy Puppy	135,000	3.99	538,650
6	Coleco 16" Cabbage Patch Kids	26,000	19.99	519,740
7	Tonka Newborns Pound Puppy Asst	57,000	7.99	455,430
8	Buddy L Phaser Force Battle	18,000	24.99	449,820
9	Vid-Tech Whiz Kid	8,000	49.99	399,920
10	LJN Toys Wrestlers - Good Guys	48,000	7.99	383,520
11	Eagle Rubber 9 In Glo Playballs	362,000	0.99	358,380
12	Sportcraft Soft Touch Dart Board	35,000	9.99	349,650
13	Fisher-Price The Puffalumps Asst	15,000	19.99	299,850
14	Vid-Tech Lesson One	7,000	39.99	279,930
15	Worlds of Wonder Lazer Tag Game Kit	7,000	39.99	279,930
16	Fisher-price Main Street Playset	14,000	19.99	279,860
17	Hasbro Transformer Special Team	55,000	4.99	274,450
18	Galoob Baby Talk	3,900	69.99	272,961
19	Kenner Chuck Norris Kommandos	40,000	5.99	239,600
20	Fisher-Price Magic Vac	14,000	16.99	237,860
21	Galoob Sweet Secrets Jewelry	59,000	3.99	235,410
22	Hasbro G.I. Joe Devilfish	39,000	5.99	233,610
23	Hasbro Transformer Autobot Mini Vehicles	78,000	2.99	233,220
24	Worlds Wndr Books/Tapes Teddy Ruxpin	19,000	11.99	227,810
25	Playskool Alphie (TVF)	9,000	24.99	224,910
26	Bradley Scruples	15,000	14.99	224,850
27	Hasbro G.I. Joe Figure Asst	75,000	2.99	224,250
28	Marchon Talk-To-Me-Teddy	7,000	29.99	209,930
29	Kenner Thunder Hawk Camaro	16,000	12.99	207,840
30	Hasbro Little Pony Baby Ponies	26,000	7.99	207,740
31	Kenner M.A.S.K. '57 Hurricane	12,000	16.99	203,880
32	Nikko RDC Jet Panther	5,000	39.99	199,950
33	Hasbro Cobra Night Raven	8,000	24.99	199,920
34	Hasbro Transformer Special Teams	18,000	10.99	197,820
35	Hasbro G.I. Joe H.A.V.O.C.	15,000	12.99	194,850
36	LJN Toys Thumb Wrestlers	38,000	4.99	189,620
37	Amtoy My Pet Monster	7,000	26.99	188,930
38	Cricket $5.95 Jumbo Coloring Book	142,000	1.29	183,180
39	Vid-Tech Learning Window	3,000	59.99	179,970
40	Hasbro Watchimal Asst	20,000	8.99	179,800
41	Hasbro Transformer Metroplex	5,000	34.99	174,950
42	Hasbro Transformer Autobot Ultra	7,000	24.99	174,930
43	Baden "Rainbow" Mini Basketball	25,000	6.99	174,750
44	Hasbro G.I. Joe A.W.E. Striker	17,000	9.99	169,830
45	Chosun Heart-To-Heart Bear	6,000	27.99	167,940
46	Coleco 12 In Cabbage Patch Babies Asst.	6,000	27.99	167,940
47	Playskook My Buddy	6,000	27.99	167,940
48	Coleco Rambo Good/Bad Figures	28,000	5.99	167,720
49	Ohio Art Animated Etch-A-Sketch	3,000	54.99	164,970
50	Ohio Art Etch-A-Sketch	16,000	9.99	159,840
51	Hasbro Jem/Jerrica Fashion Doll	13,000	11.99	155,870
52	LJN Toys Thundercats Figure Asst	26,000	5.99	155,740
53	Mattel Medium Plush Poppies	9,000	16.99	152,910
54	Kenner M.A.S.K. Firefly	19,000	7.99	151,810
55	Matchbox Rubiks Magic Puzzle	19,000	7.99	151,810
56	Amtoy Madballs	38,000	3.99	151,620
57	Worlds of Wonder Talking Grubby	3,000	49.99	149,970
58	Coleco Cabbage Patch Cornsilk Kids Asst	5,000	29.99	149,950
59	Galoob Flex Power Machine	6,000	24.99	149,940
60	Lakeside 17 In Wrinkles	6,000	24.99	149,940
61	Mattel Rockers Barbie Doll	15,000	9.99	149,850
62	Parker Monopoly	14,000	9.99	139,860
63	Kenner Play-Doh 4-Pack	55,000	2.49	136,950
64	Hasbro Little Pony Twinkle-Eyed Asst	27,000	4.99	134,730
65	Hasbro Transformer Dinobot Asst	11,000	11.99	131,890
66	Worlds Wndr Teddy Ruxpin Cost Asst	10,000	12.99	129,900
67	Hasbro G.I. Joe Cobra S.T.U.N.	13,000	9.99	129,870
68	Hasbro G.I. Joe Tomahawk w/Figure	7,000	17.99	125,930
69	Kenner Fluppy Dogs	5,000	24.99	124,950
70	Panosh Laser Combat Challenge	3,000	39.99	119,970
71	Fisher-Price Farm Playset	6,000	19.99	119,940
72	LJN Toys Wrestling Ring	6,000	19.99	199,940
73	S & R Trivial Pursuit	6,000	19.99	119,940
74	Tonka Newborns Puppy Pack	6,000	19.99	119,940
75	Fisher-Price Bubble Mower	8,000	14.99	119,920
76	Fisher-Price Power Workshop	8,000	14.99	119,920
77	Fisher-Price Toddler's Kitchen	8,000	14.99	119,920
78	Bradley Pig Pong	10,000	11.99	119,900
79	Hasbro Little Pony So Soft Pony Asst	24,000	4.99	119,760
80	Playskool Sesame St Busy Poppin' Pals	9,000	12.99	116,910
81	Kenner Vampire Venom	19,000	5.99	113,810
82	Hasbro G.I. Joe Dreadnok Thunder	11,000	9.99	109,890
83	Parker Nerf Indoor Golf	6,000	17.99	107,940
84	Bradley Life	9,000	11.99	107,910
85	Hasbro Transformer Triple Changer	9,000	11.99	107,910
86	Parker Clue	9,000	11.99	107,910
87	S & R Scrabble	12,000	8.99	107,880
88	Parker Clue (VHS) VCR Game	3,000	34.99	104,970
89	Bradley Bed Bugs Game	8,000	12.99	103,920
90	Hasbro G.I. Joe Conquest X-30	8,000	12.99	103,920
91	Kenner M.A.S.K. Raven Corvette	8,000	12.99	103,920
92	Hasbro Little Pony Flutter Ponies	23,000	4.49	103,270
93	Kenner M.A.S.K. Firecracker	6,000	16.99	101,940
94	Kenner M.A.S.K. Condor Cycle	17,000	5.99	101,830
95	Fisher-Price Creative Music Maker	5,000	19.99	99,950
96	Hasbro Transformer Autobot Vehicle Asst	9,000	10.99	98,910
97	Hasbro Serpentor The Cobra	16,000	5.99	95,840
98	Mattel Tropical Barbie	16,000	5.99	95,840
99	Atari Video Game System	2,000	44.99	89,980
100	Fisher-Price Tape Recorder	2,000	44.99	89,980

Source: M. W. Kasch Company, Mequon, Wis., for Jan. 1 to Dec. 31, 1986 period, covering 1,700 stores, including approximately 765 discount and specialty discount stores, in 12 Midwestern states.

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Balmy Clime Melts Winter Sports; Nurtures Early Spring Sales

By Frank Katlin
Vice Chairman,
Maurice Sporting Goods

An unusually mild winter short-circuited what had seemed to be a most promising year in sporting goods sales, but that same balmy weather should add up to strong spring sales. In total, 1986 can only be looked at as marginally successful, due mainly to collapsing sales in the Christmas season, as skis and cold weather apparel performed poorly.

That was on top of a flat (or slightly down) fall hunting season, so the cumulative effect, after a strong spring and summer, was a modest 5% to 7% rise in retail sales. Tough competition and a lack of new products in the hunting market have resulted in retailers reducing floor space in the category, which has historically been of marginal profitability for discounters.

Market Levels Off

What Christmas sales there were were bolstered by strong rower and treadmill sales, highlighted by the performance of three machines at promotion prices. The Weslo Dual Action rower at $100, the AJ 5000 treadmill at $200 and the Precor 615E rower at $299 all sold very well at retail.

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
	FISHING			
1	Berkley Lightning Rods	144,000	39.99	575,856
2	Keeper Bait Fish Formula	109,000	4.99	543,910
3	Dupont Stern Line	83,000	5.99	497,170
4	Zebco Classic S.C. Reel	20,100	21.99	441,999
5	Plano 3 Tray Tackle Box 6303/7303	33,200	12.99	431,268
6	Zebco S.C. Kit 1245	31,800	12.99	413,082
7	Zebco 33 CP Reel	24,900	14.99	373,251
8	Sluth Bend C105/0112 Kit	34,700	9.99	346,653
9	Shakespeare FSP Series	29,800	9.99	297,701
10	Kwik Stix 1300 Series Rods	32,800	8.99	294,872
11	Ryobi VMAG3 Reel	10,200	25.99	265,098
12	Techsonic LCR	1,760	149.99	263,982
13	South Bend Spin Kit C305	25,265	9.99	252,397
14	Johnson 225 Reel	16,400	12.99	213,036
15	Daiwa PMAIOS Reel	4,100	49.99	204,959
	FIREARMS			
1	Marlin Rifle W/Scope	12,868	89.99	1,157,991
2	Marlin 30AB Rifle	4,530	179.99	815,355
3	U.S.R.A. Shotgun 120385	3,620	189.99	687,763
4	Remington 700 Rifle	1,500	349.99	524,985
5	Ruger 10/22 Rifle	3,400	129.99	441,966
	ATHLETIC & HUNTING ACCESSORIES			
1	Bear Archery Compound Bows	1,525	99.99	152,485
2	Crossman Air 17CL BB Gun	3,200	44.99	143,968
3	Mini Mag Lite MMC	11,850	9.99	118,381
4	Tinks Deer Scents	10,500	9.99	104,895
5	Koplin Hot Seats	21,000	4.99	104,790
6	Schrade Knife LB7	3,300	29.99	98,967
7	Trophy Club 304 Coverall	3,100	29.99	92,969
8	Crossman Air 760 BB Gun	2,280	34.99	79,777
9	Hoppe Gun Cleaning Kits	7,480	8.99	67,245
10	E.Z. Mt Gun Rack	5,300	7.99	42,347

Source: Maurice Sporting Goods, Chicago, for calendar 1986. Maurice supplies 25,000 sporting goods outlets, 72% of them discount stores, in 45 states. Prices reflect average price points of discount clients.

However, with increased competition and lower margins, the exercise market as a whole has leveled off.

Growth in 1987 will be in the outdoor sports market, particularly in fishing and camping gear. With extraordinarily mild late winter and early spring weather around most of the United States, sales in these two categories, as well as in most other outdoor activities, have taken off. Camping equipment has shown the most impressive gains in recent years, and shows no sign of slowing down. Young people are flocking to outdoor activities in record numbers, and that shift has resulted in strong sales of cabin tents and sleeping bags.

Mini Team Games Trend

There has also been a strong trend toward "mini" team games like Tee ball and mini basketball, and aluminum baseball and softball bats are doing extremely well.

The mild winter has also benefited fishing equipment, which will be a leader in strong spring sales. Among the products I expect to perform well are three promotionally priced reels:

- Johnson Crappie Pro Reel—promotionally priced at $11.99;
- Daiwa Strike Gold Reel—$24.99;
- Zebco 33—featured on rebate at $9.99.

Two tackle boxes at promotional prices should also do well: the Plano Mini-Phantom at $19.99 and the Plano 707 23-compartment box at $19.99 to $24.99.

In general, racquet sports have become very slightly profitable staples, and I don't see them going radically up or down in the near future. Racquetball, in particular, is very nearly a dead issue as the construction of new courts continues to slow down.

Tough Foreign Competition

The meteroic upswing in recent years of exercise equipment was so remarkable that it had to cool off eventually, and it did in 1986. There is simply too much product on the market. A combination of price pressure, a flood of duplicate equipment and tougher foreign competition, which has reduced prices precipitously in the past two or three years, effectively leveled profitability at retail. For example, the equivalent of an exercycle selling for $300 two years ago can be had, via Taiwan, for $49 in many discount stores. The sales were still there, but the impressive growth of the early 80's is over.

On the other hand, the growing preference among young people for activities that keep them outside is good news for retailers; most outdoor sports equipment is nowhere near peaking and remains very profitable.

Discounters Capture 15.4% of $25.3 Billion H&BA Market

(Continued from page 32)

strong basic and promotional sales already being recorded. LaMaur, maker of our No. 1 conditioner, Perma Soft, will launch another high ticket brand, Textra in the fall. Helene Curtis has introduced Salon Selectives to go after the lucrative beauty shop business. Procter's restaging of Pert should work well. The brand will be the first to boast silicon conditioners, touted as the technological breakthrough of the 80's.

The mousse category has leveled off ,and we recommend buyers cut back on sku's while sales are still reasonably high. Aqua Net took the No. 1 position, followed by Alberto. Clairol jumped from nowhere to No. 3 and No. 10, making it our top gainer.

While gels and fixatives are on the rise, be careful not to over-sku as this growth will be far less dramatic and short-lived than that of the mousse segment.

The $1 billion dentifrice category saw tartar control toothpaste take over seven of the top 15 positions last year, with Crest gaining back lost market shares from Colgate. As expected, Colgate introduced its own tartar control toothpaste, but could not keep up with the demand. As production gears up, Colgate will gain some share back, but will not, in all probability, be able to catch up with Crest's commanding lead.

The blade category, which had been experiencing a cannibalization of dollar profits by a swing to the low end disposable segment (similar to that of shampoos), saw a resurgence of the high end business as Atra took the No.1 and No. 2 positions and Trac II landed in No. 3 and No. 4. Disposables took a total of six spots on the PMA. In 1987, we expect Atra Plus to continue to surge toward the top while the competition at the low end, between Gillette, Bic and Schick, intensifies.

The $1 billion dentifrice category saw tartar control toothpaste take over seven of the top 15 positions.

The contraception category is expected to be our largest percentage gainer this year as condom sales continue to explode. Hyped by publicity surrounding the AIDS controversy, distribution of condoms has expanded rapidly among most mass merchandisers.

Another major growth area in 1987 will be the incontinent category. Incontinence presently affects 10 million Americans. With the over-50 population growing twice as fast as the total population and with exorbitant cost of hospital care and nursing homes, the category is expected to grow from $92 million in 1986 sales to over half a billion dollars by 1990. Kimberly-Clark's Depend will come up against Procter and Gamble's Attend and Personal Products' Surety this year.

The H&BA industry growth has traditionally been driven by new product introductions. In 1987, this basic tenet of our business is in jeopardy. Most vendors have found that it is more expedient and economical to attain market share by purchasing brands or entire companies as opposed to launching new products.

Revlon bought Barnes-Hind and Max Factor; Lever Brothers has taken over Chesebrough-Pond's, and Procter & Gamble bought Vicks and its Olay, Nyquil, Sassoon and Pantene brands. As the trend continues, more dollars will be spent on Wall Street instead of on Madison Avenue.

Sales increases will be harder to come by in the future as a result.

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
	BAR SOAPS			
1	Dial 4-Pack 5-oz	81,649	1.99	162,482
2	Zest 1 Free with 3 5-oz	74,916	1.99	149,083
3	Coast Bath 5-oz	215,438	0.69	148,652
4	Zest Bath Size 5-oz	253,296	0.58	146,912
5	Dove Bath 4¢ Off 4.75-oz	155,592	0.87	135,365
6	Dove Bath White 4.75-oz	154,520	0.83	128,252
7	Dove Bar 69¢ Prepriced 3.5-oz	185,760	0.64	118,886
8	Ivory Personal 4-Pack	120,134	0.97	116,530
9	Coast Bath 1 Free with 3 5-oz	57,656	1.99	114,735
10	Ivory 4-Pack 12¢ Off 3.5-oz	101,340	0.99	100,327
11	Dial 1 Free with 3 3.5-oz	56,484	1.49	84,161
12	Safeguard Bath Size	106,273	0.69	73,328
13	Safeguard 1 Free with 3 5-oz	35,370	1.99	70,386
14	Irish Spring 1 Free with 3 5-oz	24,661	1.89	46,609
15	Zest Bath 8-Pack 5-oz	9,288	4.89	45,418

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
	COLD PRODUCTS			
1	Nyquil Nightime Medicine 10-oz	39,224	5.79	227,107
2	Nyquil Nightime Medicine 6-oz	49,800	3.69	183,762
3	Afrin Spray 15-cc	49,282	3.29	162,138
4	Sudafed Tablets 30 mg 24's	59,509	2.69	160,079
5	Alka Seltzer Plus 36's	30,432	4.59	139,683
6	Dristan Tablets 50's	20,554	6.49	133,395
7	Alka Seltzer Plus 20's	45,837	2.79	127,885
8	Actifed Decongestant Tablets 24's	31,616	3.89	122,986
9	Halls Mentholyptus Bag 30's	121,248	0.99	120,036
10	Dristan Tablets 24's	30,866	3.79	116,982
11	Drixoral 12 Hour SA Tablets 10's	34,806	3.19	111,031
12	Comtrex Cold Tablets 24's	28,763	3.79	109,012
13	Halls Cherry Bag 30's	104,252	0.99	103,209
14	Coricidin D Tablets 24's	28,741	3.79	108,928
15	Dimetapp Extentabs 12's	24,578	3.39	83,319

Source: Boston Distributors, Maple Heights, Ohio, for January through December, 1986. The company supplies 1,200 stores, including over 650 discount stores in 23 states. Average retail prices reflect typical price points for mass merchandisers.

STATIONERY HARD LINES

Home Office Leads 24% Stationery Growth as Promos Increase

By Charles Bowlus
Executive Vice President, Sales, Boston Distributors

The stationery, school supplies and home office product department enjoyed a 24% increase in sales at Boston during 1986.

Home office led this growth as many of our customers expanded departments and improved promotional programs. Vendors boosted marketing support via product development and packaging, adding to these substantial gains.

Mead Products made the greatest inroads in the flat office category by introducing the Cambridge line. While the paper line was brought out late in the year, Cambridge quickly jumped onto the Product Movement Audit charts with six sku's.

The total Cambridge program can be merchandised in 6 ft. to 8 ft. and so far it seems the consumer is willing to pay the higher price.

Mead's Matrix line of bulk office supplies should help discounters compete with the wholesale clubs on the top volume commodity items. But the product is not for every retailer since the supplies are packaged for office use.

Esselte led file accessories with seven PMA rankings. A hanging file folder in a 10-pack took the No. 1 spot and the complete system ranked No. 2. The vendor's line of color-coordinated office accessories and files dominated the file category with six sku's on that PMA.

The company recently introduced pastels in file cabinets, decofiles and decoracks and merchandises these effectively beside similarly-colored W.T. Rogers accessories.

The biggest news in the file and accessory category this year, however, is the Rubbermaid line. Superior products and packaging will help the retailer get top dollar on the recently introduced line.

Discounters with limited space should go with a 4-ft. Rubbermaid section, but an 8-ft. stretch will maximize the impact and sales potential.

The step-up in product quality and cost being enjoyed in the office area has also been experienced in the flat school market segment. Mead's 5 Star and Glare Care lines both did extremely well last year, attaining five spots on our PMA between them.

The only licensed school paper item that made it to the top ranks was the Peanuts ABC tablet. As most licensed lines are weeded out of the school paper assortments due to low sales, Peanuts has remained strong. Ranked No. 7, the tablet generated nearly $25,000 in retail sales last year.

Endcap displays from August through April are recommended as the strong packaging will push through the products at reasonable margins and high dollar-per-unit profit.

Commodity goods were led, of course, by wide margin filler paper in the 200-ct. package, followed by the narrow rule 200-ct. paper.

Merchants who support a strong basic presentation with promotions including endcaps and print ads will achieve record sales in 1987.

Prices on commodity stationery lines like these are expected to be considerably higher this year at both the manufacturer and retail levels due to the higher price of paper.

Writing instruments were led by Faber's 10-pack pencils, generating $138,969 in sales last year. Crayola took four of the top 15 rankings with its broad, fine and two Lite Brite tip selections. Bic's 10-packs held five of the top spots.

Trapper Keeper binders were far and away the best sellers in that category. Model 29096 generated nearly $150,000 in retail dollars and Model 24100 just topped $100,000. The No. 3 best seller was the Flex 3 notebook with pad, accounting for about $57,000 last year.

File boxes were led by the Rockaway security chest Model H300, responsible for over $28,000 in sales during 1986. The Rockaway cash box and bond box also made the top 15 listing.

The No. 2 file box was the Oxford Keep It File with over 1,000 units sold for a total of nearly $24,000 retail dollars last year.

The products available today in the school and home office categories enable the retailer to create a department with an impact to generate significant new sales.

I believe merchants supporting a strong basic presentation with promotional programs, incorporating endcaps and print ads will achieve record sales levels in 1987.

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
OFFICE SUPPLIES				
1	System Clasp Envelope 9 x 12 25 Count	12,372	1.97	24,373
2	Cambridge Steno Book	12,826	1.79	22,959
3	System Clasp Envelope 10 x 13 76022	11,351	1.97	22,361
4	System Clasp Envelope 6 x 9	10,624	1.97	20,929
5	Cambridge Stiff Back Legal Pad	11,394	1.79	20,395
6	Cambridge Stiff Back Quad Rule	10,511	1.79	18,815
7	Mead Wire Index Card 4 x 6	16,788	1.07	17,963
8	Cambridge College Notebook Stiff	9,818	1.81	17,771
9	Mead Wire Index Card 3 x 5	19,859	0.89	17,675
10	Office Buddy Square Labels	14,843	1.19	17,663
11	Dome Weekly Bookkeeping Record 600	2,304	6.97	16,059
12	Office Buddy Colored Stars	13,402	1.19	15,948
13	Office Buddy White Labels	12,204	1.19	14,523
14	Cambridge Analysis Pad 13 Column	4,127	3.49	14,403
15	Cambridge Analysis Pad 6 Column	7,232	1.79	12,945
FILE BOXES				
1	Rockaway Security Chest H300	1,927	14.87	28,654
2	Oxford Keep It File	1,008	23.79	23,980
3	Rockaway Cash Box H260	1,782	10.29	18,337
4	Sentry Fire Chest 1100	572	27.95	15,987
5	Esselte File It Yellow	1,227	12.97	15,914
6	Esselte File It Brown 40788	1,010	14.87	15,019
7	Rockaway Bond Box	1,414	9.29	13,140
8	Steno Desk Tray with Cutout	4,710	2.79	13,136
9	Mead 21 Pocket Expand File 35280	2,561	4.98	12,754
10	Esselte Pend Deco Flex	1,643	7.67	12,602
SCHOOL PAPER				
1	Mead Filler Paper Wide 200 0215	269,963	0.59	159,278
2	SF Filler Paper Narrow 200 10203	98,328	0.59	58,014
3	Theme Book Wide Margin 10½ x 8	77,749	0.49	38,097
4	Glare Theme College 3 Subject 150 Count	13,178	2.19	28,860
5	Five Star Theme 100 College 9 x 6	18,482	1.49	27,538
6	Five Star Theme 3 Subject 150 11 x 8	8,416	3.19	26,847
7	Peanuts ABC Tablet	27,748	0.89	24,696
8	Mead Theme Varsity 100 Count	16,351	1.19	19,458
9	Five Star Theme 5 Subject 200 11 x 8	4,839	3.97	19,211
10	SP Theme Wide 5 Subject 200 Count	11,654	1.63	18,996
11	Mead Color Talk Theme 120 Wide 10 x 8	20,961	0.89	18,655
12	Five Star Theme 2 Subject 100 Count	9,387	1.97	18,492
13	Mead Scribble Tablet 150 Count 57202	9,957	1.79	17,823
14	Mead Book of Colors 9 x 12	8,990	1.97	17,710
15	Data Theme College 3 Subject 150 Count	13,008	1.19	15,480

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
WRITING INSTRUMENTS				
1	Faber 10 Pack Pencil Pegged	235,078	0.59	138,696
2	Crayola Markers Broad	25,920	2.39	61,949
3	Crayola Marker Fine	25,500	2.39	60,945
4	Bic 10 Pack Biro Blue Medium	45,665	1.19	54,341
5	Papermate 10 Pack Pens Med Blue	35,935	1.19	42,763
6	Papermate 10 Pack Pens Med Black	34,225	1.19	40,728
7	Faber 20 Count Pencils Seconds	51,936	0.76	39,471
8	Carter Marks-A-Lot Black	66,767	0.59	39,393
9	Bic Biro 10 Pack Black	28,449	1.19	33,854
10	Bic Pens Blue 10 Pack	27,077	1.19	32,222
11	Bic Pens Black 10 Pack	25,798	1.19	30,700
12	Crayola Lite Brite Broad	13,669	2.19	29,935
13	Crayola Lite Brite Fine	12,396	2.39	29,626
14	Bic Four Color Pen	16,453	1.49	24,515
15	Papermate Power Point Profile Slim	9,737	2.30	22,395
FILE ACCESSORIES				
1	File Folder Hanging 10 Pack	7,829	5.97	46,739
2	File Folder System Assort Hanging	3,685	10.49	38,556
3	File Folder 1/3 cut 12	10,972	1.19	13,057
4	Esselte 48 Count File Folder	2,854	4.55	12,986
5	Red Wallet Envelope 10 x 15	13,018	0.98	12,758
6	Red Wallet Envelope 9 x 11	13,196	0.93	12,272
7	Red Wallet Envelope 4 x 10	12,549	0.69	8,659
8	Esselte File Folder 1/3 Colored 15 Count	2,093	1.88	3,935
9	File Folder 1/3 Cut Legal	1,934	1.49	2,882
10	Hanging File Folder 20 Count	887	0.49	435
BINDERS AND PORTFOLIOS				
1	Trapper Keeper Binder 29096	27,211	5.29	143,946
2	Trapper Keeper Designer Binder 24100	20,000	5.29	105,800
3	Flex 3 Notebook with Pad	10,745	5.29	56,841
4	Mead Super Shades Binder	8,627	5.29	45,637
5	Data Center Binder 29300	7,259	5.29	38,400
6	Organizer Binder 29400	5,874	5.29	31,073
7	Duo Report Cover 3-Hole 2 Pack 54128	93,396	0.29	27,085
8	Scholar Set Binder File	4,152	5.29	21,964
9	Mead 5 Star Binder	3,994	5.29	21,128
10	Major 1½-In. Canvas Binder Clear	7,824	2.68	20,968
11	Trapper Portfolio 2 Pocket 33150	42,387	0.49	20,770
12	Duo Report Cover 2 Pocket 50825	95,891	0.21	20,137
13	Trapper Portfolio Fashion 33102	29,973	0.59	17,684
14	Stacco Arranger Binder	2,096	7.84	16,433
15	K&M Binder Slant Vinyl 1½	2,903	5.29	15,357

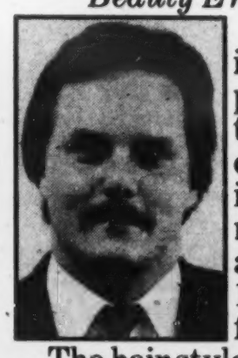
Source: Boston Distributors, Maple Heights, Ohio, for January through December, 1986. The company supplies 1,200 stores, including over 650 discount stores, in 23 states. Average retail prices reflect typical price points for mass merchandisers.

$ Rank	Item	Unit Movement	Average $ Retail	Total $ Movement
	ETHNIC HEALTH AND BEAUTY AIDS			
1	Soft Sheen Care Free Instant Moist 8 oz	489,562	3.65	1,786,901
2	Soft Sheen Care Free Instant Moist 16 oz ...	271,810	6.53	1,774,919
3	Gentle Treatment Kit Original	143,777	8.96	1,288,242
4	Soft Sheen Care Free Curl Activator 8 oz ...	318,069	3.96	1,259,553
5	Dark & Lovely Relaxer Kit #420	151,088	7.39	1,116,540
6	Right On Curl Activator 8 oz	265,860	3.38	898,607
7	Soft Sheen Care Free Curl Activator 16 oz ..	120,498	7.16	862,766
8	Luster S-Curl Kit Original	87,804	8.96	786,724
9	Revlon Relaxer Kit Regular	78,061	8.09	631,513
10	Luster S-Curl Activator 8 oz	149,086	4.01	597,835
11	Right On Instant Moist 8 oz	165,083	3.56	587,695
12	TCB Hair & Scalp Conditioner 8 oz	147,787	3.83	566,024
13	Right On Curl Activator 16 oz	87,199	6.48	565,050
14	STA Sof Fro Spray Dry 8 oz	158,356	3.45	546,328
15	TCB Oil Sheen 13 oz	130,471	3.83	499,704
16	World Of Curls Activator Gel Reg 6 oz	146,954	3.38	496,705
17	Cream Of Nature Relaxer Kit Regular	61,581	8.06	496,343
18	Soft Sheen Care Free Curl Snap Back 6 oz ..	178,924	2.69	481,306
19	Dark & Lovely Excelle Kit	52,041	8.96	466,287
20	Dark & Lovely Relaxer Plus	61,673	7.39	455,763
21	Revlon Relaxer Kit Super	55,550	8.09	449,400

Source: Beauty Enterprises, Hartford, Conn., distributor of ethnic health & beauty aids to over 3,000 domestic accounts, about 20% discounters. Avg. retail prices represent 10% decreases in manufacturers' suggested retail.

Hair Relaxer Preparations to Propel Growth in Ethnic Beauty Aids Market

By Rocky Piccirillo
VP, Operations
Beauty Enterprises



The growth in ethnic hair preparations this year will continue to be in relaxer formulas, a trend apparent in the 1986 shipment figures.

The hair styles requiring relaxer use were reincarnated late in 1984 and continue to grow in popularity.

While Gentle Treatment and Dark & Lovely captured the No. 3 and No. 5 spots, with $1,775,000 and $1,117,000 in annual sales, other emerging brands such as Cream of Nature, Soft & Beautiful and Excelle by Dark & Lovely are coming on strong.

Many products born from the curl generation are being used as maintenance items on natural hair styles. Gel activators, as an example, originally were used to bring curly permed hair back to life.

Gels survived the transition from the curly to the straight look and their popularity grows. Worlds of Curls and Long Aid will dominate gels.

The less-greasy consistency of gel formulations also spurred the newest surge of products called "lite."

Lite products originally were launched by Soft Sheen Products in mid-1984 but have not caught on to the degree that ethnic manufacturers expected. Soft Sheen and Alberto Culver's TCB brand, two major players, should withstand the test of time.

Most vendors have gone into the lite sub-category of hair preparations, including about 50 sku's recently introduced by companies such as Lustrasilk, Lusters, American Beauty, Johnson, Posner and Bronner Bros. Only a handful have taken a wait-and-see stance on lite lines.

Despite all the product, packaging and advertising muscle backing the lite lines, we expect to see only five or six of these items in the top 100 by the end of the year.

Styling preparations and skin related products also been focused on by ethnic manufacturers seeking to fill the void left by declining curl product sales. While these lines are marginal sub-categories—about 6.5% of total sales at Beauty Enterprises, for example—they're getting more space at the retail level.

Styling gels, for instance, were 1% of ethnic sales at Beauty Enterprises. Last year, a typical 12-ft. department would have about nine linear inches of these gels, but because of new sku's, including larger sizes and tubes, as well as new product introductions, shelf space would be closer to 15 linear inches. As a result, sales of these gels will probably account for about 1.5% of sales by year end.

Now, the styling gel subcategory is controlled by Pre Con Gel, Vigorol Pro Tex Gel and Posner Styling Gel. Dark & Lovely Styling Gel is among the strongest new entries.

Hair color will continue on its slow, but sure, growth course. New packaging and colors by Dark & Lovely and Cream of Nature hair color, a new product entry, should spark the merchandise group.

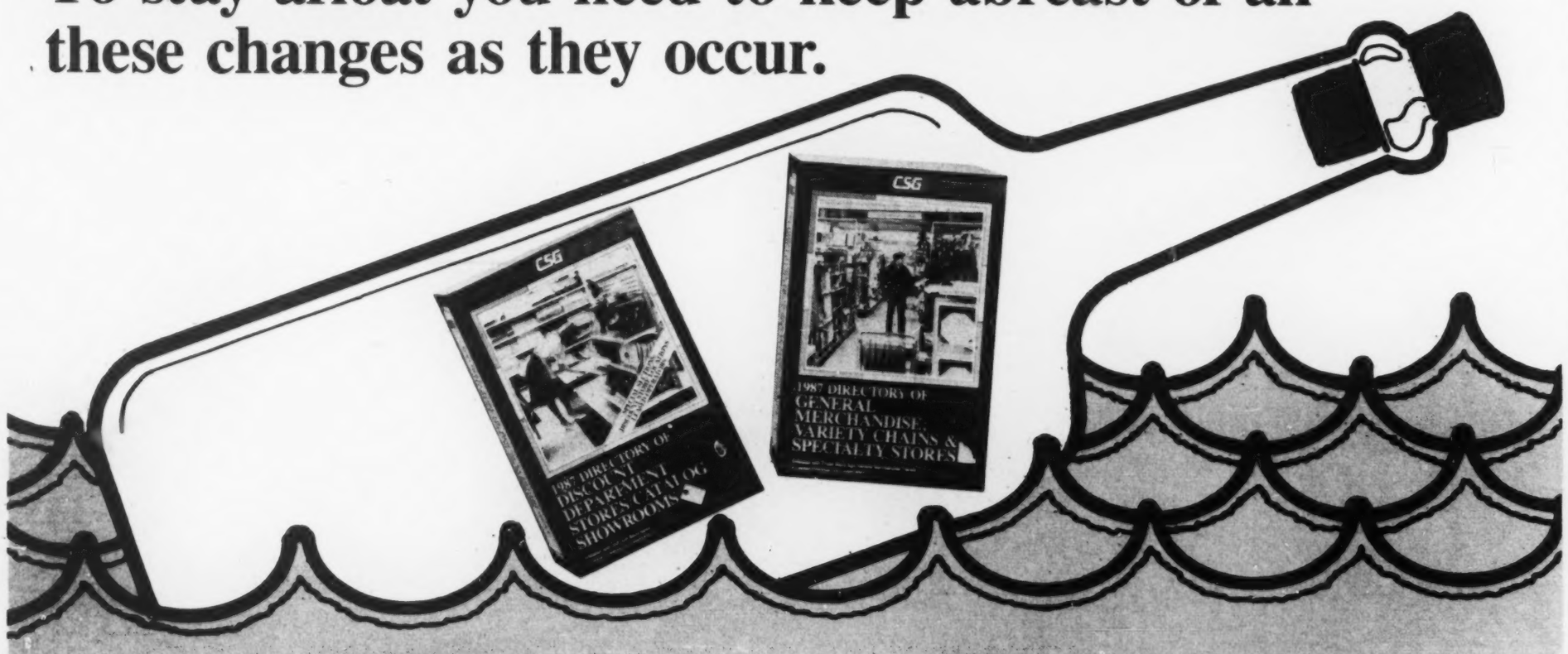
Beauty Enterprises expects Lustrasilk's Right On Curl to be the best new item of the year, but because of the nature of the market, it's unclear where the product will prove strong.

Regional differences in brand strength are obvious and must be recognized when planogramming. We have broken the country into five regions, and the top mover differs in three of the five areas.

The prices listed in this report are 10% less than manufacturer suggested retail. Retail prices will vary considerably, depending on the region and the chain.

Beauty Enterprises is a distributor of black beauty products based in Hartford, Conn., and is a member of the National Association of Service Merchandising and the General Merchandise Distributors Council.

Upscaling, upgrading, diversifying, consolidating—the mass merchandising universe is changing rapidly. To stay afloat you need to keep abreast of all these changes as they occur.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. . . Leased department operators are fading away in favor of company-run units.

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